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AUTHOR Barca, Isabel
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ABSTRACT

This paper traces some ideas produced by adolescent students when deciding among different explanations of a past situation. For this purpose, a sample of 270 Portuguese students ranging from 12 to 20 years old, attending 7th to 11th grades, was analyzed in a qualitative approach. Students' ideas were mapped through five levels of progression, in light of a theoretical framework considering criteria for assessment of explanatory validity. The results of this research suggest that adolescents argue for and against explanations by applying, at various levels of sophistication, criteria of explanatory consistency and methodological detachment. In history education, this is relevant to designing instruction that will enable students to reason about explanatory validity and to help them progress beyond stereotypes or commonsense views when deciding among several versions of the past. One appendix contains different sample historical versions of an event, and the other contains the task questions. (Contains 1 table and 22 references.) (Author/SLD)

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Adolescents' Ideas about Explanatory Assessment in History

Isabel Barca
Universidade do Minho-Instituto de Educacao
4710 Braga Portugal
Fax:351 53 678987
E:mail: isabar@iep.uminho.pt

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ABSTRACT

This paper traces some ideas produced by adolescent students when deciding among different explanations of a specific past situation. For this purpose, a sample of 270 students ranging from 12 to 20 years old, attending the 7th to 11th grades, was analyzed in a qualitative approach. Students' ideas were mapped through five levels of progression, in the light of a theoretical framework considering criteria for assessment of explanatory validity.

The results of this research suggest that adolescents argue for and against explanations by applying, at various levels of sophistication, criteria of explanatory consistency and methodological detachment. In history education, this is relevant to designing instruction that will enable students to reason about explanatory validity and to help them progress beyond stereotyped or commonsense views when deciding among several versions of the past.

Key words: history education; historical explanation; cognition; students' conceptions.

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Adolescents' Ideas About Explanatory Assessment In History

I. Barca

The idea of assessment of historical explanations: is it important in education?

In the debate about the nature of history, a recent objectivist approach has expressed the need to shed light on the specific criteria applied in the assessment of concrete historical explanations, being this concept - historical explanation - taken to be an answer to a why-type question about the human past (McCullagh, 1984; Martin, 1989). Under this approach, it is significant to examine how historians usually decide among competing answers to a historical question - or, which explanation of a given past situation might be considered more powerful than others.

Sceptical and relativist views about knowledge have emphasized the deconstruction of general principles of subjectivity and objectivity. According to such views, reality is discussible and figurative, available only within language (Lemert, 1992). Language takes the place of truth and, as there are no final vocabularies, there are no essences. The contingency of a world perceived through contingent languages is stressed. The world is seen as a representation and the analysis of the mediation between authors and the supposed reality is the focus (Derrida, 1978; Rorty, 1989). As far as history is concerned, diversified studies have been produced under this general approach - and some of them are fascinating! The written and the spoken language, gesture and symbol, language of sources and language of silence are examples of objects of recent historical research (Olábarri, 1995). Nonetheless, at the epistemological level, if all discourses tend to be relativized

according to the contingency of their social production, all of them tend to be equally validated, leaving room to an "an easy-going" attitude towards produced work (Garfinkel, 1981). Therefore, the criteria for critically evaluating diversified answers to a specific question might be left in shadow if a mere desconstructionist paradigm is followed.

Historians at work share some strategies to give meaning to the human past. Which methodological standards are thus required for a good historical explanation? In the same wavelength of authors such as Dray (1966, 1980, 1991), Atkinson (1978), McCullagh (1984) and Martin (1989), this study assumes that some criteria employed by historians for a) weighing different factors of an occurrence or, b) assessing more or less valid historical explanations, are related to principles of *explanatory consistency*.

The notion of explanatory consistency may refer to evidential corroboration and non refutation (in Popperian terms, 1980) or to the plausibility of the situation. As suggested by Hawthorn (1991), when trying to decide among well-grounded, consistent explanations, the most powerful will be the one which more questions and of a wider scope can raise. Under this theoretical framework and also inspired by Pennington and Hastie (1992), the operational idea of explanatory consistency applied in this study discriminates between the following sub categories:

a) *Evidential consistency*, concerning the extent to which an explanation is accepted in the light of the available evidence, through corroboration and non refutation;

b) *Logical consistency*, in terms of plausibility, concerning the extent to which an explanation is consistent with knowledge of real or imagined events in the real world.

Principles of consistency of historical explanations are related to a largely discussed and controversial notion of *methodological detachment* concerning the historian's craft. Cohering with the critical approach defended above, this study assumes that the notion of

methodological detachment entails the recognition of the social production of historical knowledge (the historian's perspective, or point-of-view, is a genuine feature in history) together with the need for validating different historical products by means of common methodological standards.

In history education - with its potential for a deeper understanding of the world - it is important to progress beyond a plain approach to explanations of the past. Students can progressively gain awareness on how can we distinguish between a historical and a non historical explanation, be it fiction or propaganda. And, assuming a more critical stance, it might be desirable that they progressively gain some intellectual tools - or adequate criteria - to critically distinguish between a better and a worse explanation among several valid answers. After all, at everyday level in society, people have to make choices on multiple offers! Common sense views about the social world such as: *"we cannot know which answer is better because it depends on each point-of-view"* or a dogmatic position strictly based on personal emotions: *"only this explanation is true because it is the one which pleases me most"* will not help to make informed decisions in a pluralist society (Barca, 1996).

Under such a framework, which involves epistemological and educational concerns, the following research questions were raised:

How do adolescent students deal with different answers to a question about the past?

Which criteria do they apply when deciding among different historical explanations?

Method of the study

Population and sample

Portuguese adolescents ranging from 12 to 20 year-olds attending the 7th to 11th grades, in secondary schools involved in teacher training under supervision of the University of Minho (northern Portugal), constituted the target population. A sample of 270 students was drawn from eight schools selected according to criteria of cultural setting and SES; these schools are located in different cultural environments (city, rural or industrial town) and have an heterogeneous population as far as socio-economic status is concerned. From this sample, 150 students participated in the pilot phase, and their responses were qualitatively analyzed in the light of "grounded theory" (Strauss and Corbin, 1991). In the main phase, 119 students attending the 7th, 9th and 11th grades in two schools (urban/rural), from classes randomly selected, provided data for qualitative and statistical analysis. At the 7th grade, ages ranged from 12 to 16, at the 9th grade from 13 to 20, at the 11th grade from 16 to 20; age modes were 12-13 at the 7th grade, 14-15 at the 9th grade, 17 at the 11th grade.

Historical materials- A set of historical materials was designed for purposes of answering to a historical question:

> **Why did the Portuguese manage to establish a maritime empire in the Indian Ocean during the sixteenth century?**

Four historical versions were selected and adapted. Two versions (version A emphasizing a *Moslem factor* and version B emphasizing a *Chinese factor)* may be seen as valid competing explanations; another explanation (version C) written in 1946 emphasizes a *nationalistic factor*; the last version (D) is a *description* about the occurrence and factual antecedents (Appendix 1). The historical materials also included a set of sources which were intended to corroborate versions A and B.

Task materials and procedures

A paper-and-pencil task-set on the historical materials was devised. Among several tasks, students were asked to state why are there different explanations of the same historical situation, to rank and argue for and against those different explanations (Appendix 2). An interview-guide to clarify or better justify the written answers was also devised.

During the pilot study, the tasks were administered to students of different grades and schools at different moments (four phases, in two years) in order to progressively build the model for analysis and to reformulate the instruments. A week after the paper-and-pencil task administration, students were individually interviewed. In the final data collection, the paper and pencil task-set was administered to each classroom within a period of one month. Ten percent of this subsample was subsequently interviewed within an individually arranged schedule, during the same month.

Method of analysis - The model of grounded theory provided the analytical procedures for inspiring a set of "rules of thumb" to make sense of data in terms of students' conceptions. Grounded theory is defined as a style of qualitative research "that is inductively derived from the study of the phenomenon it represents ... it is discovered, developed, and provisionally verified through systematic data collection and analysis of data" (Strauss and Corbin, 1991, p. 23).

Progression in ideas of explanatory assessment: a working model

Responses of 119 students were analyzed in the light of a working model - an hypothesis - on students' ideas of explanatory assessment which was progressively generated, in the line of research on progression of pupils' ideas in history, conducted by Dickinson and Lee (1978, 1984), Shemilt (1987), Lee, Ashby and Dickinson (1996), and also inspired by Wineburg (1991). Five levels of ideas on criteria for assessing historical explanations were identified. These criteria were analyzed on the basis of general statements produced about explanatory variance in history and the specific arguments adduced by students for their practical choices concerning the four historical versions given.

1. STORIES

Historical versions are seen as stories of past events. A major concern for substantive, sometimes fragmented information (facts) is suggested. Ideas on evidence, logic or methodological detachment, when they emerge, appear at an everyday level and related to description of what and how something happened rather than to why it happened.

Example: Ana, 13 years old, 7th grade, upon reading all the material and writing her own answer to the given historical question in a descriptive mode, states about explanatory variance:

> **It depends on the author's personal opinion, and no one can give the certain explanation. Version B [can be a better answer] because what happened is not very well known, so there are several versions.**

Ana's first statement is a quotation of items given in the task-set. Her responses suggest the emergence of ideas about variance of historical answers due to uncertainty about facts. She seems to reason about descriptions of the past rather than about explanations. In a subsequent task, Ana ranks the four historical versions

1. **Version D** (Description)
2. **Version B** (Chinese factor)
3. **Version C** (Nationalistic factor)
4. **Version A** (Moslem factor)

and argues for her ranking as follows:

> **Version D explains more how discoveries were made.**
> **Version C only explains that a vast domain was conquered with a few human and financial resources. Version A says that the Portuguese fought the Moslems.**

The how (discoveries were made) and what happened is valued over the why (the Portuguese managed to control the Indian Ocean). Information is mainly quoted from the given versions, and treated as facts of the situation, not as factors to a possible explanation. Evidence and plausibility for the posed question are not considered.

2. THE RIGHT EXPLANATION

An emergent pattern at an explanatory mode is observed. An explanation - or a description, as these concepts do not appear clearly distinct - appear to be right if proved by real facts (evidence treated as proofs). A tendency to strictly argue, in terms of an everyday plausibility, for one (or two) familiar factors against others, as the right answer, is observed.

Luis, 14 years old, 9th grade, after giving a mono-causal explanation, states about explanatory variance:

> **[There are different explanations] because those are facts which happened a long time ago, therefore only through documents can we prove something.**
> **[An explanation cannot be considered better], because these versions vary, it is like Medicine.**

Luis contradictorily suggests a relativist idea about knowledge of the past ("facts which happened a long time ago", "versions vary") and a concern for evidence as factual proofs ("through documents ...we prove something"). These ideas might mean some overlapping between description and explanation. However, his analogy "versions vary, it is like Medicine" appears more elaborate, if it is personal, and it seems that he tentatively operates at the level of explanatory hypotheses, as his arguments following his four versions' ranking may suggest:

1. **Version D** (Description)
2. **Version C** (Chinese factor)
3. **Version A** (Moslem factor)
4. **Version C** (Nationalistic factor)

> **The importance of the first version [D] in relation to the second [C] is that, the trade was made by sea and thus a deep knowledge concerning navigation on oceans was necessarily required.**
> **[Version D is better justified by sources]. I think that the Portuguese domination is not due to rivalries with other people but is due to the wish to get rich.**
> **[A and C are worst] In the sense of wishing war with other people.**

Luis clearly operates at an explanatory level: he argues for his favored explanation (D) against his second best (B) valuing the economic motive and the naval factor. In this passage, and in the interview, Luis concentrates his arguments for version D in terms of the explanatory plausibility of one factor - the economic motive - against the military factor, stated at the level of an everyday assumption. He claims his preference for versions D and B as "the two most correct versions", cohering with his concern with documents as proofs for the past.

3. THE MORE FACTORS THE BETTER

A pattern of valuing aggregation of factors is observed. This pattern might range from ideas suggesting an overlapping between quantity of facts and factors, when the notion of factor appears to be established in a restricted form, to clear ideas about evidential and logical consistency. The latter involves more elaborate notions viewing explanations made up of interlinked factors according to different points of view. The ideal seems to be the grasping of a total past; concerns for methodological detachment are not explicit.

Teresa, 17 years old, 11th grade, states about explanatory variance:

> **Each author faces questions in a different way, and then, there are diversified factors which are more important to one author than to another.**
>
> **A better explanation doesnot exist because each answer has always something, even small, that cannot be rejected.**

Teresa suggests a selective point of view in explanation ("each author faces questions in a different way") and simultaneously assumes a realist position ("there are diversified factors"). A scissors and paste model, with a concern for a multicausal explanation made up of each ("even small") bit from every version, appears. She ranks the given versions

1 - **Version D** (Description)

2 - **Version A** (Moslem factor)

3 - **Version B** (Chinese factor)

4- -**Version C** (Nationalistic factor)

and argues for her ranking:

> **The first version [D] explains better as it shows the steps taken by the Portuguese and what the Portuguese really went to take due to economic needs at the time.**
>
> **[Version D is better justified by sources because] It shows well the various factors in which the Portuguese were superior to the Moslems.**
>
> **As far as version C is concerned, I don't think that morality and leaders' correctness were important, and in relation to version B, I think that the question about the Chinese being or not being in the Ocean is not very important.**

Teresa argues for version D as a multicausal explanation, alluding to a antecedents, motives and military conditions of the historical situation. She justifies the evidential consistency of version D by referring the "various factors" it implicitly conveys. Teresa might be establishing a relationship between factors inferred from version D and those sources referring to Portuguese and Moslem resources. Versions B and C, undervalued by her, are discussed by weighing the relative logical consistency in terms of everyday plausibility.

4. A NEUTRAL EXPLANATION?

Explanation is valued in terms of muulticausality and of a perspectiveless neutrality. The idea of perspective beyond a common-sense level, integrating notions of bias and/or different cultural presuppositions is suggested. These notions appear as negatively interfering in principles of an absolute neutrality, which is considered as essential to a valid explanation. A multicausal explanation is valued and evidential consistency is seen in terms of interlinked factors conveyed by sources. The plausibility of the explanation may consider the specific historical context. This main pattern may vary between an objectivist trend considering the possibility of attaining an absolutely neutral explanation whether by an authority or through consensus, and a relativist trend assuming that, as such a neutrality cannot be attained, explanations are relative to a given perspective.

Mario, 13 years old, 7th grade, points out:

> **Each historian only shows the factual side in which she/he is interested, some wanting to show that the Portuguese were not so good as they looked, some saying the opposite.**
>
> **A better explanation doesnot exist because each one speaks only about what she/he finds more important, not speaking about all the facts.**

Mario is aware of the historian's perspective. He shows a special preoccupation about the problem of bias when he "deconstructs" historical production in the light of underlying cultural presuppositions, apparently assuming a relativist position. However, in the interview, he makes clear how to "control" for neutrality:

Int: So, you think that no historian can...

Mario: No, I don't! A Portuguese, or a Moslem historian will never write a book with the right story about discoveries! But some from other countries not directly influenced by discoveries - neither Spanish nor English - could do it!

Therefore, Mario seems to opt for an objectivist position when he states that neutrality can be attained by eliminating direct involvement in the situation to be explained. As far as practical choices and related arguments are concerned, Mario states:

1 - Version D (Description)

2 - Version B (Chinese factor)

3 - Version A (Moslem factor)

4 - Version C (Nationalistic factor)

[D is better] Because it speaks of the different steps taken by the Portuguese for the domination of Africa and the Indian Ocean, while version B only speaks about what would have happened if...

[Version D is better justified by sources because] It gives a more synthetic and a brief version of the historical explanation.

They [A and C] only speak of one fact about the Portuguese domination in the Indian Ocean.

Mario values version D as a multicausal explanation over a counterfactual speculation given by version B; this implies a realist position, coherent with an objectivist view defended above. He gives a low value to explanations A and C using again the criterion of multicausality. The notion of evidential consistency might seem still vague in the previous responses, but he implicitly copes with that notion ("the factual side") when, for example, he discusses the issue of neutrality. Factors must be interlinked and a logical explanation must reflect such interrelationship and neutrality, as he claims in the interview: "A neutral author should write the facts intertwined, with logic". Logical consistency appears to be a criterion for assessing explanations in their historical context, when he wonders:

Why did the Chinese or other European people not try to conquer the spice trade when they realized that it was so profitable?

Another example of an elaborate pattern suggesting a more relativist trend was observed in Sofia's responses, 15 years old, 9th grade:

> **Different explanations are due to the way each person sees the issue, the observed "angle" and the different historical sources.**
>
> **A better explanation doesnot exist, for me the union of all versions is the best, but even that is not the most perfect as it can always be completed by something else, which we don't know.**
>
> **No matter how the human being tries to improve the facts, there is always something slipping, something obvious but which is far away from our eyes.**

Sofia is aware that an explanation is always relative due to different perspectives and sources, firstly, she prefers to sum the different versions up to get the best multicausal explanation, but then she appears to realize that a total explanation is not possible. Thus, in her practical choices and arguments, Sofia chooses a conscious partisanship:

1. **Version C** (Nationalistic factor)
2. **Version B** (Chinese factor)
3. **Version A** (Moslem factor)
4. **Version D** (Description)

> **The first version shows the confidence in the Portuguese army and the second version shows another point-of-view saying that the Moslem naval challenge was not efficient enough against the Portuguese.**
>
> **Version C is not better justified by sources, but is the one which presents more confidence in the Portuguese than any other and as I am a Portuguese, I don't show impartiality, I take my side.**
>
> **I don't consider A and D worse, but version A is very subjective and version D doesn't explain the main motives which led the Portuguese to dominate the Indian Ocean.**

Sofia assumes a relativist position about explaining the human past. She argues for the nationalistic version C based on an emotional criterion although recognizing that such an explanation lacks evidential consistency. Sofia also criticizes version D as being a description, thus lacking logical power as an explanation. Thus, personal and emotional assumptions seem to be the main criterion for Sofia's practical decisions about explanations of the past, notwithstanding awareness of specific historical criteria. This might reveal a

tight, but conscious attitude, as far as methodological criteria are concerned, seeking in relativism a basis for a less critical choice.

5. A WELL-GROUNDED, OPEN EXPLANATION?

The notion of perspective appears entangled in criteria of methodological detachment and consistency for a multicausal explanation. Although a genuine point of view is beginning to be accepted in an historical explanation, such a notion is still tentative, in the sense that it may coexist with a conflicting ideal of a single answer to be attained through a perspectiveless neutrality. Emergent ideas of (a) confirmation and refutation, and/or of (b) plausibility considering the specific historical context, are suggested.

Lurdes, 17 years old, 11th grade, after constructing a multicausal explanation, points out:

> **Nothing is definitive, there are always several ways of seeing something. Everything is relative when as in this case there are no proofs to clarify and establish a single interpretation.**
>
> **Yes, [an explanation can be considered better than others] if it is** more explicit in a way **to beat the other arguments.**
>
> **There are no definitive truths and nothing guarantees that that explanation might not be put into question.**

Lurdes assumes that several perspectives lead to several answers. However, she seems to oscillate between this idea of recognition of a genuine point of view and that of applying perspective to controversial explanations only. She considers explanations as open to assessment through a critical argumentation, which suggests a concern for logical and evidential consistency in terms of corroboration/non refutation. Lurdes ranks the versions given:

1 - **Version A** (Moslem factor)

2 - **Version B** (Chinese factor)

3 - **Version C** (Nationalistic factor)

4 - **Version D** (Description)

and justifies:

> **The first [A] does not speculate, it only refers to why we defeated the Moslems; the second [B] refers to an aspect which might be very important but, in spite of everything, did not really happen.**
>
> **Version A is better justified because when describing the Moslem fleet they explain our victory as Moslems reinforced their land army at the expense of the maritime fleet...**
>
> **[Versions C and D] do not present "tangible" reasons, the Portuguese might be very determined but the enemies could defeat us with their material resources; beside that, in the last case, it only describes the events by order and not why and how they happened.**

Lurdes ranks the four versions valuing those which appeared to be the two most valid explanations as far historical standards are concerned. She assumes a realist view by preferring version A over version B, as the former conveys a factor which "really happened", while the latter presents what she envisages as a mere speculation. Thus, an explanation based on a counterfactual possibility is considered important by Lurdes, but not so much as one based on something that "really" happened. When arguing for evidential consistency of version A, she alludes to evidence about the Moslem fleet (conveyed by four of the sources given) which might corroborate the *Moslem factor*. When arguing for or against the several versions she weighs their logical consistency by taking into account the specific historical context, coherently referring to the several factors to be weighed (Moslem and Chinese factors, material resources versus Portuguese morale). In conjunction with her idea of non definitive explanations open to refutation ("to be put into question"), Lurdes' responses suggest elaborate criteria of explanatory power, on grounds of evidential and logical consistency.

Levels of progression by grade

A statistical analysis was viewed as desirable to illuminate some possible major trends in the population studied. Responses of the 119 students were coded in order to analyze, among other tendencies, the frequency distribution of levels of progression in ideas by grade (see Table).

Table: Progression in ideas about explanatory assessment by grade (N=119)

Level	Grade 7	9	11	Total
1	20	3	-	23 (19%)
2	12	10	3	25 (21%)
3	17	23	15	55 (46%)
4	1	5	6	12 (10%)
5	-	-	4	4 (3%)
	50	41	28	119

chi-square = 44.18, df = 8, *p < 0.05

The general pattern suggests that there is a progression from the 7th to the 11th grade. Level 1 (related to a descriptive pattern) was observed in the 7th and 9th grades, only. Level 2 (suggesting a concern for the right factors) was observed in the three grades with only a few pupils in the 11th grade. Level 3 (related to a concern about multicausality) was the most observed level in the three grades, but at different rates (34% in the 7th grade, 56% in the 9th grade and 54% in the 11th grade). About half of the 9th graders and 11th graders suggested ideas typical of Level 3. Level 4 (concerning a major criterion of neutrality) was more frequently achieved by the 11th graders. Level 5 (related to emergent ideas of a consistent, open explanation) was achieved by 14% of the 11th graders.

The mode of frequency and rates observed indicate that an aggregationist level remains the most popular pattern across the last two grades, that is, from the 9th grade (the last year in compulsory schooling) to the 11th grade (with history as one curricular choice). More

critical patterns employing criteria of evidential consistency in terms of corroboration and refutation, logical consistency in terms of considering the historical context, and methodological detachment in terms of a perspectiveful neutrality, appear tentatively and at a low rate.

Comments

The results of this study suggest that Portuguese adolescent students deal with competing historical versions by arguing for and against them at various degrees of sophistication. The educational context in Portugal, focusing on a substantive historical content which is given explicit in the national curriculum, does not foster such intellectual skills; nonetheless, the informal education in a pluralist society, where different points of view are publicly discussed at home, among peers, on the mass media, might implicitly provide the tools to make the handling of diversified information and alternative explanations a relatively familiar experience for adolescents. But it is pertinent to ask: at what levels of sophistication do adolescents use to decide when facing different answers to a given social or historical issue? Do they simply apply criteria at an everyday level on *the* evidence (the more the better) or the plausibility (important versus not important) for assessing explanations? Do they employ more elaborate criteria related to explanatory consistency and methodological detachment? This study suggests that, in the assessment of different historical answers, Portuguese adolescents tend to apply aggregationist criteria leaving in shadow a critical examination of evidence and a contextualized plausibility of the situation.

It must be stressed that different reasons, as well as arguments at different degrees of sophistication, may justify similar practical choices as far as historical versions are concerned. As an example taken from this study, the descriptive version was found to be the most popular "explanation" through all grades, but some students argued for it by

converting facts into explanatory factors. Among those students showing a preference for the nationalistic version, some argued for it in terms of Portuguese "morale", not moral superiority, some justified their emotional choice by assuming a relativist position once their criteria of methodological neutrality was considered an ideal impossible to be attained.

Adolescents may be encouraged to think about several explanations of the past and to gradually develop a critical argumentation for their decisions, rather than following a question-and-answer routine about *the* historical explanation. Only students focusing on information may find it too confusing. Any approach to the development of a critical reasoning must be progressively carried out in accordance with the conceptual levels observed by the teacher.

At the information age, it is crucial to discuss how to prepare young generations to be selective consumers. In the history education field, proposing to adolescents a progressive assessment of explanations in terms of their relative consistency, might be a contribute - among many others - for such a challenge.

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Appendix 1
Historical Versions

VERSION A

Openly defying the Moslem domain and combating the Moslem faith, the Portuguese had to meet as their main enemies in Asia the Egyptians and the Turks. It helped the Portuguese considerably that none of these major Moslem countries based its power upon the sea."

O. Marques (Portuguese historian), *H. de Portugal*, 1980

VERSION B

The Islamic naval challenge to the Portuguese, when it came, was ineffective ...

Had the Chinese still been present in the Indian Ocean when the Portuguese arrived, one can only speculate what might have happened. The decision to withdraw the Chinese fleet 60 years before was a momentous one, leaving the "door left open" (to the Europeans) into the Indian Ocean.

A. Pacey (English researcher), *Technology in World Civilization*, 1990

VERSION C

This large domain quickly conquered with a few human and financial resources can only be explained by the moral correctness of the Portuguese great leaders, by the sacrifices for the country made by all the people.

A. Matoso (textbook author), *Compêndio de História Universal*, 1946

VERSION D

The sailors of Prince Henry were those who took the first and most difficult steps into the unknown lands for the Europeans ... The western African coast was progressively explored. The Portuguese caravels brought back gold, spices, furs, ivory and slaves from those regions.

Meanwhile, between 1405 and 1433, the emperors of China sent seven expeditions to explore the Indian Ocean, commanded by Cheng Ho, bringing back to China spices and unusual animals, including lions and giraffes.

Upon Bartolomeu Dias having rounded the Cape of Good Hope, a new expedition, commanded by Vasco da Gama, arrived in India, in 1498. After that, the Portuguese quickly took control of the lucrative spice trade, for almost a century by forbidding other people to trade in the Indian Ocean and seizing the main ports through which the spice route passed.

Based on *Explorers*, 1991 and *Exploration & Empire*, 1990

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Appendix 2
Task Questions

(Excerpt from Task 2):

* Why are there **different explanations** about the Portuguese domination of the Indian Ocean?

* Do you think that **one of the explanations can be considered better** than any other? Justify your answer.

(Task 3):

* **Rank** the four versions given in order of importance as an **historical explanation:**

1st: Version _____
2nd: Version _____
3rd: Version _____
4th: Version _____

* In what respects do you consider **the first better than the second** in explaining why the Portuguese managed to control the Indian Ocean?

* Do you consider **the first version better justified by the sources**?
Why?

* Justify **your last two choices** (versions ranked 3 and 4):